

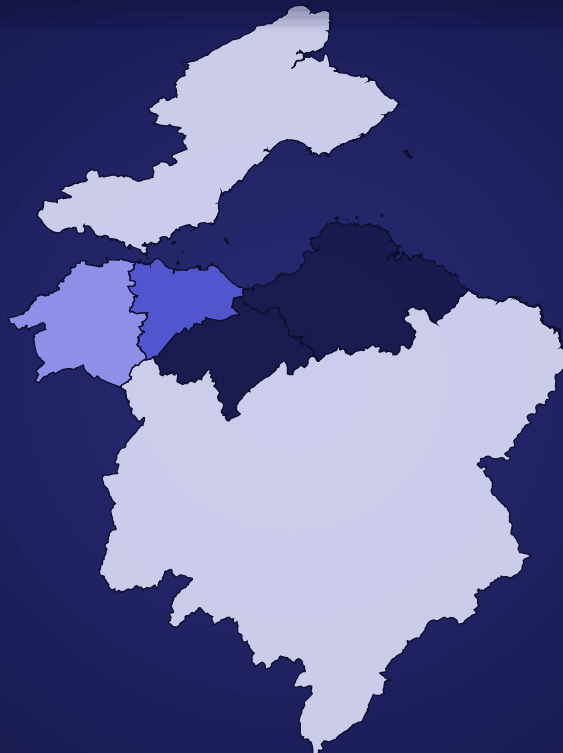
South East Scotland sales.

What the region pays.

Prices, time to sell and discount to asking across the 6 council areas of South East Scotland — built from Land Registry sales and live listings, reported on a trailing twelve-month basis.

12 months to 2025-12 • 31,839 homes to market • 6 council areas

Data as at 2026-09-21



South East Scotland sold prices, *climbing sharply.*

All figures are trailing 12-month values. Cut-off dates differ by dataset.

SOLD PRICE

£247,471

+9.8% YoY

11,612 observations

PRICE PER SQFT

£259

+2.6% YoY

80,439 observations

DAYS TO SELL

54

-11.8% YoY

129,378 observations

DISCOUNT TO ASKING

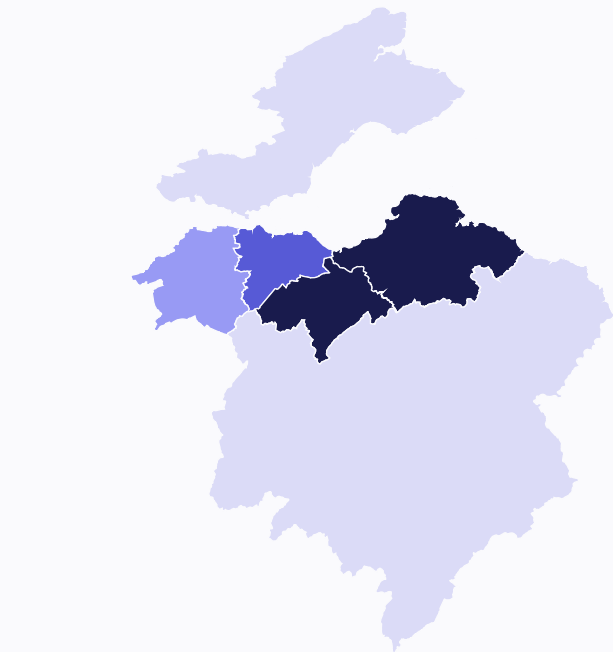
-2.37%

+1.0% YoY

6,167 observations

Sold price by council area

12 months to 2025-12



Highest and lowest

COUNCIL AREA	£	YOY
Midlothian	380,667	+51.4%
East Lothian	279,117	+0.7%
City of Edinburgh	266,803	-1.1%
West Lothian	228,139	+13.8%
Fife	193,136	+12.6%
Scottish Borders	190,311	+7.0%

Under £200,000 £200,000 - £250,000 £250,000 - £275,000 £275,000 and above Insufficient data

What the data shows

Five of the six areas rose, though the scale of the move belongs to Midlothian — £251,381 to £380,667 in a year. The rest sit between -1.1% and +13.8%, with City of Edinburgh the only faller, slipping from second to third as Midlothian passed it. Sales a month fell by roughly half in every area, so these medians rest on a thinner base than a year earlier, Midlothian's on a median 71 a month.

IN THIS ISSUE

02 Segments

Price by property type, the new-build premium, and which areas are tightening.

03 Supply

Homes coming to market, and how close sales settle to asking.

+

Also held

EPC, title and ownership, land transactions, demographics and planning policy.

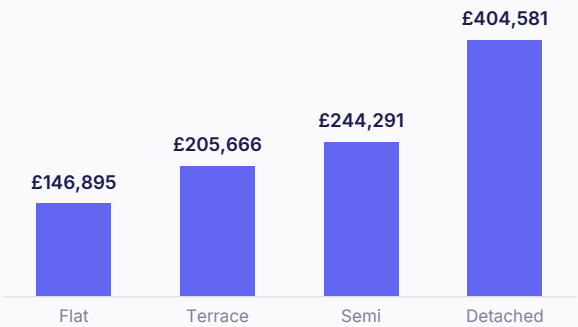
Analysis covers 6 council areas and 31,839 homes brought to market over the 12-month window, from 6,167 underlying records.

Underneath *the headline.*

The same 12-month window, cut by property type and by build type.

Asking price by property type

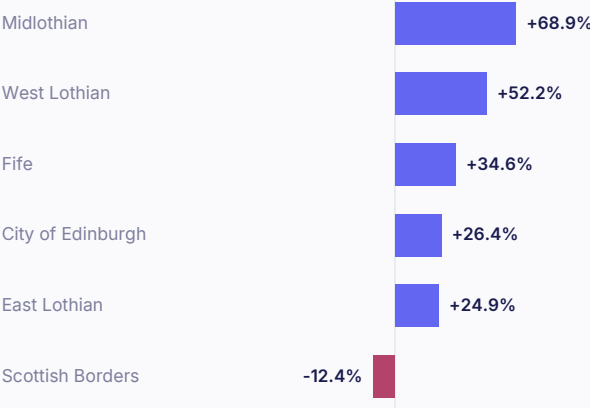
Median across council areas, 12 months to 2026-05



A detached home asks +175% over a flat.

New-build price premium

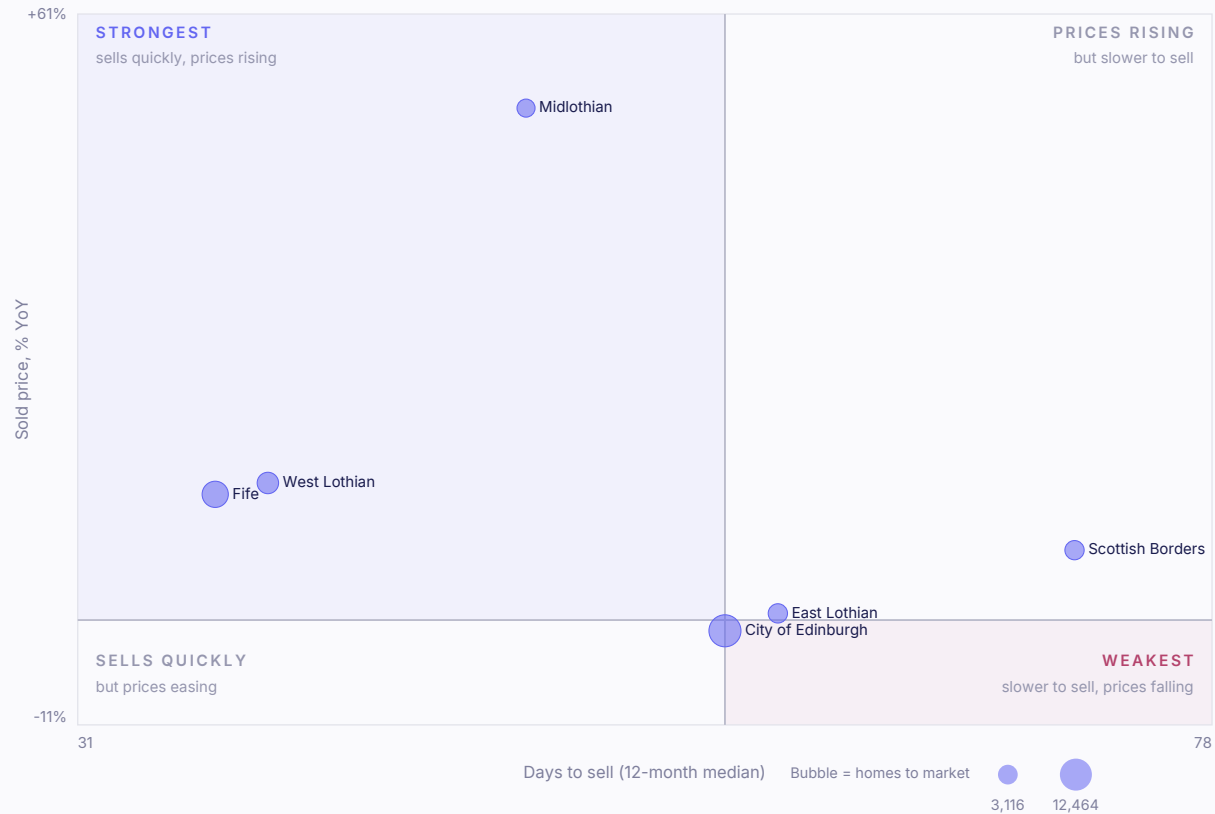
New-build against secondary asking price
Raw comparison; not adjusted for unit size or specification.



6 of 6 council areas hold enough new-build stock to report.

Where the market is tight

Each council area placed by how fast homes sell and how prices have moved. Bubble size is the number of homes brought to market.



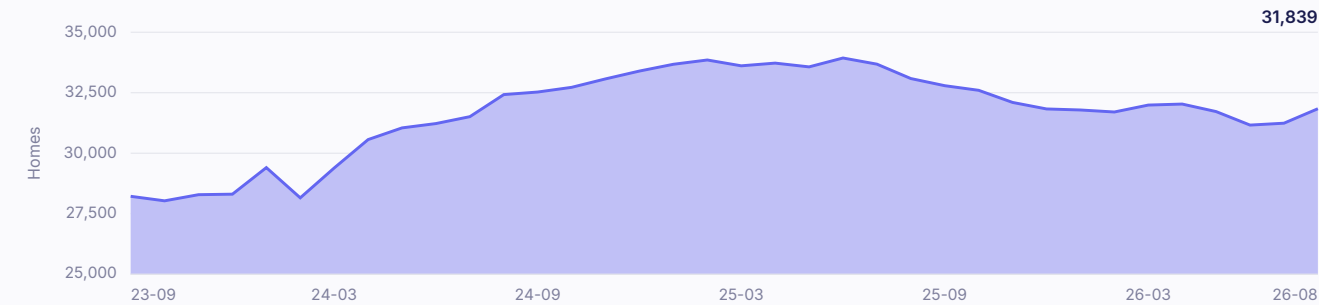
Flats are the largest sample by some way, at a median under half the detached figure. New-build asks below secondary in Scottish Borders alone, -12.4% against Midlothian's +68.9%. On the scatter, Midlothian pairs the largest price move with one of the narrowest margins above asking.

Where buyers *have least room.*

Homes coming to market on a 12-month rolling basis, and how close sales settle to asking.

Homes coming to market

South East Scotland total, homes that came to market in the preceding 12 months

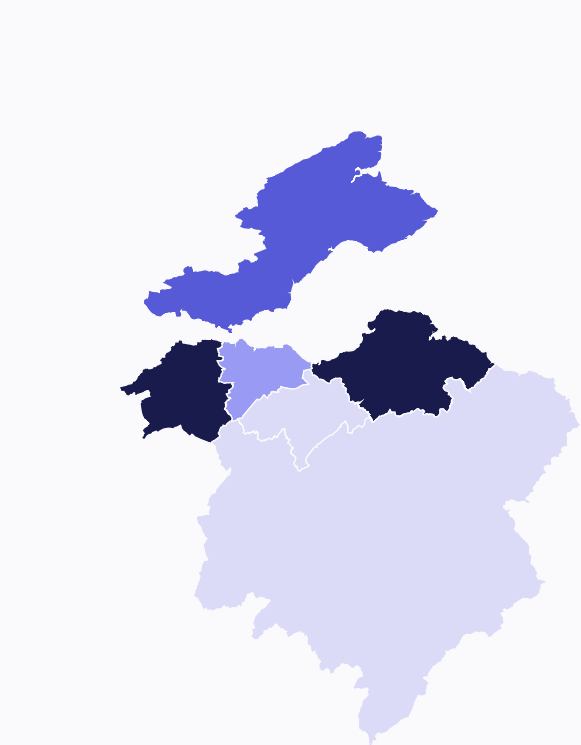


Supply is -3.8% against a year earlier.

Where buyers bid above asking

Median discount to asking, 12 months to 2025-12. Negative means the home sold above asking.

Darker areas settle furthest above asking. Scottish homes are marketed at an upset price and bid up from it.



Furthest above asking

COUNCIL AREA	DISCOUNT %	PRICE YOY
East Lothian	-4.40	+0.7%
West Lothian	-4.17	+13.8%
Fife	-2.44	+12.6%
City of Edinburgh	-2.29	-1.1%
Midlothian	-1.53	+51.4%
Scottish Borders	-1.21	+7.0%

South East Scotland median -2.29%; the spread across all 6 council areas is 3.19%.

Homes brought to market fell 3.8% over the year, and one area runs against that: Scottish Borders added 15.0% more listings while the rest were flat or down, West Lothian furthest at -7.7%. It also settles closest to asking, at -1.21%, against East Lothian's -4.40% — though every area in the region still sold above asking.

Below -2.50% -2.50% to -2.40% -2.40% to -2.00% -2.00% and above Insufficient data

METHODOLOGY AND SOURCES

All figures are trailing 12-month values; no single month is quoted. Recent months are excluded until their sample reaches 80% of the settled-period median, so cut-off dates differ by dataset (sold price to 2025-12). Areas below the sample floor are shown as insufficient data. Map bins are fixed between editions. South East Scotland figures are the median across council areas, not a population median. REalyse also holds EPC, title and ownership, land transactions, demographics and planning policy data at this geography. Source: REalyse. Data vintage: land 2026-06-05, listings 2026-09-21, lrOtherTransactions 2026-06-03, planning 2026-09-25, poi 2024-12-17, postcodes 2022-08-05.

Best practices have been used in compiling this report; inaccuracies may nonetheless remain.